



Remote Management System  
Software  
V.04.02.03

User's Manual

## Introduction of Remote Management System (RMS)

Remote Management System is a software package running on a PC used to monitor, control, and manage a Mini-Bank ATM. RMS connects to a Mini-Bank ATM via modem and it archives its information using Microsoft ACCESS™ database.

### 1. Hardware Requirements

- Pentium class PC
- 128 MB of RAM
- 2 GB of HDD
- 56K Modem
- FDD
- CD-ROM

### 2. Software Requirements

- Windows 98SE, ME or XP™
- Microsoft ACCESS™ database (recommended, but not required)
- Microsoft Excel 97™ (recommended, but not required)
- Use in conjunction with other types of ATM monitoring software can cause problems.
- NOT COMPATIBLE WITH AOL V8.0 (if installed on the PC RMS will not run)

### 3. ATM Requirement and Compatibility

- RMS 4.0 can be used with MB-1000, MB-2000, MB-2100, MB-2200 and Nanocash ATM. Please refer to the compatibility chart for further detail.

### 4. Telephone Requirements

- Dedicated phone line for modem (if RMS Status Send is enabled)

### 5. Features

- Journal upload, archive, display and print
- ATM status check: In Service, Out of Service, Operator Function
- Cash position check: Denominations and Bill Counts
- ATM setup check and update (update with Pro Version Only)
- Statistics: Error Codes, CDU Reject, and Transaction (Pro Version only)
- AP software download (Pro Version only)
- Advertisement graphics file download (Pro Version only)
- Hardware initialization (Pro Version only)

## How to install Remote Management System (RMS) Software

1. If an older copy of RMS is presently installed (V04.00.00 or earlier), please see Addendum. V04.00.01 and later can be installed over.
2. Insert the RMS CD into your CD ROM drive.
3. At your desktop in Windows, click on My Computer.
4. Click on the icon for your CD ROM drive.
5. Click on the folder labeled DAO, next click on the folder DISK 1, in this folder look for the Setup.exe icon ( an icon with a picture of a computer with a blue screen) Double click to start the program.
6. This installation wizard will install the DAO (database) portion of RMS. Follow through the menus. Leave all checkmarked items at default. If your system does not support either Jet 3.5™ or ODBCDirect™ you will be notified and will need to remove the appropriate checkmark.
7. After DAO has been installed, go back to My Computer, click on the CR ROM icon and look for the Rmsbasic or RMS – Pro folder (depending on whether you have RMS Basic or RMS Pro). Open the folder and look for the Setup.exe icon (picture of a computer with a blue screen) Double click it to run the program.

## How to Setup RMS

1. Once RMS has been installed, you will be prompted to reboot your system.
2. Following reboot, click [Start] then [Programs] then [Remote Management System] then RMS Setup.
3. Enter RMS information.
4. Enter RMS password. This password will be required to run RMS.
5. Enter the serial number. This number is provided with the CD.
6. Enter RMS SETUP password. This password is required if you want to download a configuration setup or program files to the Mini-Bank ATM (RMS Pro only).
7. Select a default modem. RMS will display list of modems installed in your PC. Select one as a default modem. The default modem can also be changed later.
8. To run RMS, Go to [Start], [Programs], [Remote Management System] then click RMS.
9. Enter RMS Password. Wait until RMS initializes.
10. Select CONFIGURATION from the tool bar.
11. Select ALERT/LOG function.
  - ALERT: When the Mini-Bank calls into the RMS, it will beep if it is checked
  - LOG: When LOG function is turned on, RMS records events on a text file, which can be viewed through LOGVIEW function.
12. The main display window for RMS is divided into three parts. The first part displays the ATM groups, the second part displays the list of ATMs in the selected group, and the third part displays the list of modems in the PC and their ports. The modem(s) is detected automatically by the RMS software. It also displays tool bar which has list of command available for RMS.

## How to Add, Remove, and Edit ATMs for Monitoring

### Add ATMs for Monitoring

When an ATM is added, RMS creates a database file (Access™ database) for journal records. Each file can store up to 50,000 records (if it requires more than 50,000 records, it creates another file with an .mdb extension).

1. Select CONFIGURATION > ATM > ADD
2. Enter ATM information.
  - Set COLOR / MONO switch - for non-TDES MB1000 or 2000 choose "MONO" for all other ATMs, regardless of LCD type, choose "COLOR"
  - Serial number is the serial number as recorded into each individual ATM. You can obtain this from your Print All Setup report printed at the ATM.
  - Identifier is the ATM ID (this can be any identifying number you wish, i.e. terminal #)
  - Name is the name of the individual ATM.
  - Description
  - Access Phone Number is the phone number to be dialed to access the ATM.
  - Access Password is the RMS password recorded into each individual ATM (default is 333333).
  - Machine type\* is the Mini-Bank 1000, 2000, 2100, 2200 (\*not required)
  - **Serial Number, Phone Number and Access Password are required fields.**
3. Enter Manager Information (not required)
  - Enter ATM manager's information for on line reference.
4. Click on OK for confirmation.

### To Remove an ATM from Monitoring

1. Select CONFIGURE > ATM.
2. Move cursor to select ATM.
3. Double click on the selected ATM or click on REMOVE.

### Edit Existing ATM Information

1. Select CONFIGURE > ATM.
2. Move cursor to select ATM.
3. Double click on the selected ATM or click on EDIT.
4. Edit necessary information and click on OK.

## **How to Add, Remove, and Define an ATM Group**

### Add ATM Group

1. Select CONFIGURE > GROUP > ADD
2. Enter ATM Group Information
3. Click on OK for a confirmation

### Remove ATM Group

1. Select CONFIGURE > GROUP
2. Select ATM Group to be removed
3. Click on OK for a confirmation.

### EDIT ATM Group

1. Select CONFIGURE > GROUP
2. Select ATM Group to edit
3. Click on EDIT
4. Add ATMs to the group or remove ATMs from the group.
5. Click on OK for a confirmation

## **How to Add, Remove, and Define an ATM Monitoring Schedule**

### Add ATM Monitoring Schedule

1. Select CONFIGURE > SCHEDULE > ADD
2. Enter ATM Monitoring Schedule Information
  - Name of ATM
  - Request type. (Either Transaction Report or Journal Upload)
  - Schedule selection and starting time.
3. Click on OK for a confirmation

### Remove ATM Monitoring Schedule

1. Select CONFIGURE > SCHEDULE
2. Select ATM Monitoring schedule to be removed
3. Click on OK for a confirmation.

### EDIT ATM Monitoring Schedule

1. Select CONFIGURE > SCHEDULE
2. Select ATM Monitoring Schedule to edit
3. Click on EDIT
4. Modify the monitoring schedule information.
5. Click on OK for a confirmation

## How to Request and Receive Terminal Information

Remote Management System can dial to an ATM and receive the information stored in the ATM. Each time RMS dials into an ATM it will automatically update status, new journal counts, bill counts and denominations and displays the information on its main display (this update is regardless of information being requested). The procedure to request information is as follows:

1. Select REQUEST from the main display tool bar.
2. Choose ATM name.
3. Choose information type you want to request. **(remember to always request a "setup" the first time you connect to an a new ATM, this will create a database for that machine.)**
4. RMS will dial out to the ATM and receive the information requested.
5. RMS will disconnect after receiving the information requested.
6. RMS will display the information for your view.

The types of information RMS can request and receive are:

Last X Journal	It receives the X number of the most recent journal records. If a journal record received is already in the journal record database, it overwrites. If not, it adds to the database. (X= number you enter)
Upload Journal	Receives journal records added into the electronic journal but not uploaded yet. It automatically adds them into the journal database and archives them.
Clear Journal	Moves journal upload pointer to the most recent journal records without uploading journals. This <u>does not</u> delete journal records from the electronic journal
Setup	Receives setup information and displays for review.
Status	Receives status information and updates main display. The status information includes: <ul style="list-style-type: none"> <li>• Current ATM mode and error code</li> <li>• New journal counts</li> <li>• Denomination and bill counts</li> </ul>
Initialize	Requests to initialize an ATM when the ATM is in an error condition. If the error condition is recoverable, it will return to NORMAL condition.
Transaction	It receives transaction data such as total withdraw, total surcharge, average withdraw, and average surcharge information. After receiving the information, it resets the transaction counter.

Error Total	It receives the error summary data and displays. This information helps to determine the module level performance.
Error Total and Clear	It receives the error summary data and resets the error counters.
Reject Total	It receives note reject summary data and displays. Reject total records the frequency of each reject condition occurred by the Cash Dispensing Unit.
Reject Total and Clear	It receives note reject summary data and displays. After receiving the data, it resets the counters.

**TROUBLESHOOTING NOTE:** If you attempt to connect to an ATM and RMS cuts off prematurely or gives an error. One of 3 things happened.

- 1) Your Serial number entered into RMS did not match the serial number programmed into the ATM. These numbers must match exactly.
- 2) The RMS password did not match, verify the checksum at the terminal (0137 = 333333)
- 3) Something else at the location answered the phone (credit card machine, fax, etc.)

## How to Modify Terminal Setup Information, Download Software, and Advertisement Graphics

The RMS can send terminal setup information and download application software and advertisement graphics. This function is also used to review configuration setup.

### How to Modify Terminal Setup Information

1. If this is the first time, make sure you request "Setup" information from the terminal first. (see how to request and receive terminal information)
2. Select SEND from the main display tool bar.
3. Select an ATM from the ATM list and select SETUP REPORT from the dialog box and click on CONFIG button for a confirmation.
4. You may change setup information through the Setup information dialog box. Only the highlighted areas can be modified. There are 6 tabs of setup information.
  - SYSTEM: System related setup information such as modem setup and ISO track setup.
  - CUSTOMER1: Customer related setup information such as messages, surcharge, and BIN list.
  - CUSTOMER2: Text based advertisement m messages for MB-1000 and MB-2000.
  - TRAN/ONLINE: Transaction related setup information such as transaction limit, denomination, master key, and health check related setup information.

- ONLINE1: Host processor related setup information such as terminal ID, phone numbers.
  - ONLINE2: Software version information.
  - AD TITLE/COUPON: Advertisement and trailer message setup information. This section is applicable only to MB-2100 and MB-2200.
5. Click on SEND to download modified setup information.  
**NOTE: ALWAYS INSPECT THE COMPLETE SETUP REPORT FOR CORRUPTED OR INNACCURATE DATA BEFORE SENDING, FAILURE TO DO SO CAN RENDER ATM OUT OF SERVICE !!**
  6. Enter SETUP SEND password and click on OK. This password was defined during RMS SETUP process. Then RMS will save the modification into the database and dial into the ATM to download.

### How to Download Application Software

Application software is the software module resides in the control board (CE board) of an ATM. It controls the operation of the ATM. There are several versions of the application software and if the RMS has the setup information of an ATM, it automatically recognizes the version of the application software. *Therefore, it is very important to upload the setup information whenever a new ATM is added into the RMS database or monitoring.*

1. Select SEND from the main display tool bar.
2. Select an ATM from the monitoring list and FILE DOWNLOAD (\*.BIN) from the dialog box. Then click on CONFIG for a confirmation. Note that application software file has \*.BIN file extension.
3. Select files from the dialog box. The file names must include following names:
  - MB-1000 and MB-2000: TBL.BIN, JOB.BIN, TASK1.BIN, TASK2.BIN
  - MB-2100 and MB-2200: TBL.BIN, JOB.BIN, TASK1.BIN, TASK2.BIN, MANA.BIN, MANA2.BIN (MANA2.BIN is required only for V04.00.01).
4. Click on OPEN for a confirmation.
5. RMS will display progress bar. After finishing the application download, the ATM will initializes itself and be ready for service. After the download, it may be necessary to upload setup information to check the software version and update setup information.

NOTE: You do not have to re-enter existing setup information. However, any setup information added to the new version of application software must be entered. For example, V04.02.03 has health check message feature and the feature requires setup parameters.



## How to Download Advertisement Graphics

All Color LCD, Cashworks capable Mono LCD and Transreflective LCD models will support displaying advertisement graphics. Please refer to the Operation Manual.

1. Select SEND from the main display tool bar.
2. Select an ATM from the monitoring list and FILE DOWNLOAD (\*.PCX) from the dialog box. Then click on CONFIG for a confirmation. Note that advertisement graphics has \*.PCX file extension.
3. Select files from the dialog box. The file names must include following names:
  - MB-2100 and MB-2200: (examples)
    - M\_MPCX1.PCX for the first advertisement screen
    - M\_MPCX2.PCX for the second advertisement screen
    - M\_MPCX9.PCX for the ninth advertisement screen.
  - Click on OPEN for a confirmation.
4. RMS will display progress bar. After finishing the advertisement graphic download, the ATM will initialize itself and be ready for service.
5. If the screen titles and receipt trailer messages are necessary, use AD TITLE / COUPON feature in the SETUP information.

## How to Review and Print Journal Information

Journal information can be transferred from an ATM to the PC running RMS as described earlier section. RMS Report function displays and prints Journal, Transaction, Error Total, Reject Analysis statistics.

From the main display tool bar, select STAT/PRINT.

### Journal

1. Select an ATM from the list of ATMs being monitored.
2. Select Journal function
3. Click on VIEW. Journal Report display screen has two parts. The upper part displays the summary journal list and the bottom part displays the detail record.
4. To display a detail journal record, double click on a journal number. Then the detail record is displayed on the bottom half of the display screen.
5. To print the detail journal record displayed, move the cursor to the bottom half where the detail record is displayed and click the right mouse button. Then on screen menu displays, PRINT, PRINT PREVIEW, and EXIT. Select PRNT.
6. To print the complete list of the journal summary, click on a journal number and click on Total View. Then the bottom half will display the journal summary records. Move the cursor to the bottom half where the journal summary records are displayed and click the right mouse button. Then on screen menu displays, PRINT, PRINT PREVIEW, and EXIT. Select PRINT.

### Transaction Statistics

1. Select an ATM from the list of ATMs being monitored.
2. Select Transaction function.
3. Specify the date range.
4. Click on VIEW. It will display summary data. To review the details, select a record number and click on right mouse button and select detail view.

### Error Total

1. Select an ATM from the list of ATMs being monitored.
2. Select Error Total function.

### Reject Analysis

1. Select an ATM from the list of ATMs being monitored.
2. Select Reject Analysis function.

## Miscellaneous

### LogView

It displays RMS log file.

### DbManage

It provides a tool to maintain report and log file maintenance. If you choose to remove report file, it only delete reject analysis, error total, and transaction report files. It **does not** remove any journal files.

### About

It displays the RMS software version number and release date.

### Lock

It locks the keyboard entry. To unlock the RMS, you must enter the RMS password.

### Errorcodes Help

It displays the error codes and their description.

### ModemSelect

It selects and changes the default modem for the RMS.

## RMS Installation Addendum

For systems where an existing version of RMS (V04.00.00 or earlier) is installed.

You do not have to delete existing versions of RMS prior to installing version V04.02.03, however you will need to back up your existing Database if you don't want to re-enter all your ATM information. If you install RMS without backing up your existing Data folder, all setup, journal, transaction information will be lost.

If you have been using a previous copy of RMS and wish to save your existing ATM database, it is located in:

C:\Program Files\Remote Management System\Data

Copy or Move this folder to your desktop before deleting RMS.  
(see your Windows documentation for directions for moving or copying files)

After completely installing RMS V04.00.00 then move your Data folder back. Delete the new copy that RMS creates during installation.

**NOTE:** Users of older versions of RMS (earlier than V03.02.00) will not be able to import their existing RMS databases. The reason for this is that where as the older version used one large database for all the ATMS, the new version creates an independent database for each ATM.

### How to remove an existing copy of RMS:

1. Go to [Start] then [Settings] and to [Control Panel]
2. Click on "Add/Remove Programs"
3. From the list of software, select "Remote Management System" and click [Add/Remove]
4. Once the program has been deleted, you'll need to delete the RMSSetup registry entry.
5. Go to [Start] then [Run], type regedit and click [OK]
6. When the Registry Editor opens, double click on HKEY\_CURRENT\_USER.
7. Next double click on Software, scroll down to find RMS Application, highlight this folder with a single click.
8. Press the "delete" key on your keyboard and you will be prompted to confirm.
9. Once you have deleted the RMS Application folder, close Registry Editor and restart the computer.

At this point you can follow the installation procedures beginning on page 1 of the RMS manual.